



News Release

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CHECKBOX OPTION BIG HIT WITH TAXPAYERS IN FIRST YEAR

WASHINGTON - In its first year, nearly 21 million taxpayers marked the checkbox on their tax return, which allowed tax practitioners to talk directly with the Internal Revenue Service to solve processing issues.

IRS Commissioner Charles O. Rossotti said the program made a strong debut during the 2001 filing season. For the first time, taxpayers had the option of selecting the checkbox on the Form 1040 series.

Taxpayers who used the checkbox allowed paid preparers to talk directly with the IRS to answer questions concerning the processing of their tax returns.

This year 20,959,915 taxpayers marked the checkbox authorizing their preparer to give the IRS any information missing from their return as well as contact the IRS for information about the processing of a return or the status of a refund or payment. Additionally, the checkbox allows the paid preparer to respond to a limited number of IRS notices about math errors, offsets and returns preparation.

"The checkbox has made it easier for everyone involved - the taxpayer, the tax practitioner and the IRS," Rossotti said.

The checkbox helped IRS customer service representatives quickly resolve things such as solve math errors, collect missing data and address notice issues by talking directly with the checkbox designee.

The IRS received 122.3 million individual tax returns in 2001. Practitioners prepared more than 56% percent of those returns.

"More than half of the tax returns we process are prepared by paid practitioners. There is a definite need for the IRS to deal directly with the person who has prepared the tax return," Rossotti said. "The program has reduced a lot of headaches for taxpayers, practitioners and the IRS."

The checkbox designation is limited to paid preparers and does not eliminate the need for a Power of Attorney for issues dealing with examinations, under reported income, appeals and collection notices.

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